



Collections Coordinator

Department: Payment Services
Location: Appleton, WI
Reports to: Payment Services Manager

Direct Reports: N/A
Exemption status: Non-exempt

Purpose

The Collections Coordinator identifies non-compliant activity, minimizes financial exposure with risk to AIA and manages receivables to provide a consistent cash flow for AIA's Franchise Owners and Sales Affiliates. The Collections Coordinator is an active member of the Payment Services Team and helps others with daily tasks as needed.

Responsibilities

Collections Process

- Negotiate payment plans with customer.
- Assist with MVP rebate collection process as needed.
- Overseeing the Collection team mailbox and responding accordingly
- Taking inbound calls via the AR phone loop
- Make outbound calls/emails for collection efforts.
- Review aging for owner's AIA is responsible for collecting on will keep the credit limits and age limits with tolerable thresholds.

Account Management

- Update account data
- Identify and correct problem invoices, follow up with internal business partners.
- Manage credit limits by reviewing and reducing AIA/Owner risk for those owners that don't have AIA services.
- Manage Age limits by reviewing and reducing AIA/Owner risk for those owners that don't have AIA services.
- Coordinate account wind down activities across OES/Finance team to ensure target dates are met.

Fostering Relationships

- Prepare customer statements.
- Escalate any customer bankruptcy or legal issues to Legal services/current manager.
- Prepare and provide required information to Legal to send out franchise owner, sales affiliates and customer demands.
- Maintain positive relationships with customers in an effort to minimize financial risk.

CCF's

- Review all owners who are in a cost carry forward and reach out accordingly.
- Maintain positive relationships with AIA Sales Affiliates and Franchise Owners to ensure the highest level of service is provided.

Qualifications

Education/Experience:

- Minimum Associates Degree, preferred.
- At least three years of previous collection experience in a B2B environment preferred.
- At least two years of previous accounts receivable and customer service experience
- Experienced with Google Suite and Microsoft Office

Knowledge/Skills/Abilities/Competencies

- Personal Leadership
 - **Agile & Adaptable:** Responds to change and uncertainty with confidence and openness; seeks new experiences to develop skills; solicits and acts on feedback; learns from experiences; not afraid to take risks.
 - **Accountable:** Accepts responsibility for one's own performance and actions; follows through on commitment; assumes positive intent in others; treats others objectively and consistently; acts with integrity.
 - **Courageous:** Confronts difficult issues objectively and supports others who do the same; champions new ideas; manages personal discomfort in difficult situations.
- Team Leadership
 - **Collaborate:** Works effectively with others to meet goals and satisfy business objectives; develop and maintain strong relationships with internal/external partners; seek buy-in of stakeholders; deals with disagreements or different points of view in a constructive manner; maintains positive relationships even under difficult circumstances.
 - **Communicate Effectively:** Listens attentively and with empathy to concerns of others; adjusts message to the audience; keeps people up to date with relevant information; speaks and writes clearly; encourages others to express views, even unpopular ones.
 - **Manage Talent:** Willingly shares expertise and experience with others.
 - **Engage & Inspire Others:** Conveys trust in people's competence to do their jobs; creates a feeling of energy, excitement, and personal investment; inspires others to excel; recognizes performance that exceeds expectations.
- Thought Leadership
 - **Solves Problems:** Seeks out and considers relevant data, intuition, ideas and experience to make decisions and solve problems; effectively and

- efficiently integrates information from diverse sources; thoughtfully considers alternative solutions and perspectives.
- **Strategizes:** Thinks critically; understands implications of decisions; shares ideas for improvement; sees how his/her works relates to the work of other teams in the organization as a whole; knows which people in the organization need to be informed, what they need to know, and when to tell them.
 - **Innovates:** Generates new ideas that add value; nurtures fresh approaches and appropriate risk taking; seeks alternative points of view; approaches problems with curiosity and generates creative solutions.
 - **Results Leadership**
 - **Manages Execution:** Manage resources and time to achieve business objectives; prioritizes goals; works quickly to get things done.
 - **Drives for Results:** Fosters a sense of urgency and commitment to achieve goals and create an Owner focused environment; takes initiative to proactively address critical issues; carefully considers compliance and regulatory obligations.
 - **Maximizes Productivity:** Identifies ways to streamline and improve efficiency of work; ensures that defined processes, quality standards, and best practices are executed as designed.

Working Conditions

- Ability to sit for extended periods of time
- This position may work with some challenging customers
- Phone loop

Please note this job description is not designed to cover or contain a comprehensive listing of functions or responsibilities that are required of the employee for this job. Functions and responsibilities may change at any time with or without notice.

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